

Notice of References Cited	Application/Control No. 09/520,763	Applicant(s)/Patent Under Reexamination COMISKEY ET AL.	
	Examiner Debra F. Charles	Art Unit 3628	Page 1 of 3

U.S. PATENT DOCUMENTS

*		Document Number Country Code-Number-Kind Code	Date MM-YYYY	Name	Classification
	A	US-6,430,542 B1	08-2002	Moran, William J.	705/36
	B	US-5,918,207 A	06-1999	McGovern et al.	705/1
	C	US-6,115,691 A	09-2000	Ulwick, Anthony W.	705/7
	D	US-6,393,412 B1	05-2002	Deep, Peter	705/400
	E	US-6,405,179 B1	06-2002	Rebane, George J.	705/36
	F	US-5,835,087 A	11-1998	Herz et al.	345/810
	G	US-6,052,673 A	04-2000	Leon et al.	705/38
	H	US-6,349,290 B1	02-2002	Horowitz et al.	705/35
	I	US-6,064,986 A	05-2000	Edelman, Fredric M.	705/36
	J	US-			
	K	US-			
	L	US-			
	M	US-			

FOREIGN PATENT DOCUMENTS

*		Document Number Country Code-Number-Kind Code	Date MM-YYYY	Country	Name	Classification
	N					
	O					
	P					
	Q					
	R					
	S					
	T					

NON-PATENT DOCUMENTS

*		Include as applicable: Author, Title Date, Publisher, Edition or Volume, Pertinent Pages)
	U	The VIP FORUM, Family Services, February 2000, Corporate Executive Board.
	V	Bruce Upbin, Forbes, "Old money chasing new", June 15, 1998.
	W	Katla Sycara and Dajun Zeng, Coordination of Multiple Intelligent Software Agents, International Journal of Cooperative Information Systems, pages 1-31, no date.
	X	Russ Prince & Karen File, All in the Family Office: The Vast Majority of Family Offices Hire Outside Investment Advisers and th Market is Growing, Financial Planning, October 1, 1998.

*A copy of this reference is not being furnished with this Office action. (See MPEP § 707.05(a).)
Dates in MM-YYYY format are publication dates. Classifications may be US or foreign.

Notice of References Cited	Application/Control No. 09/520,763	Applicant(s)/Patent Under Reexamination COMISKEY ET AL.	
	Examiner Debra F. Charles	Art Unit 3628	Page 2 of 3

U.S. PATENT DOCUMENTS

*		Document Number Country Code-Number-Kind Code	Date MM-YYYY	Name	Classification
	A	US-			
	B	US-			
	C	US-			
	D	US-			
	E	US-			
	F	US-			
	G	US-			
	H	US-			
	I	US-			
	J	US-			
	K	US-			
	L	US-			
	M	US-			

FOREIGN PATENT DOCUMENTS

*		Document Number Country Code-Number-Kind Code	Date MM-YYYY	Country	Name	Classification
	N					
	O					
	P					
	Q					
	R					
	S					
	T					

NON-PATENT DOCUMENTS

*		Include as applicable: Author, Title Date, Publisher, Edition or Volume, Pertinent Pages)
	U	Synovus Spoils Wealthy Clients with Family Office Service, Bank Investment Consultant, September 1999, vol. 7, iss. 9, p. 18.
	V	Kristina Warkenthien, Mellon Creates Ultra Family Office Division, Private Asset Management, March 6, 2000.
	W	Trust Company Puts Families Online, Private Asset Management, October 18, 1999.
	X	Rockefeller & Co. web page: www.rockco.com.

*A copy of this reference is not being furnished with this Office action. (See MPEP § 707.05(a).)
Dates in MM-YYYY format are publication dates. Classifications may be US or foreign.

Notice of References Cited	Application/Control No. 09/520,763	Applicant(s)/Patent Under Reexamination COMISKEY ET AL.	
	Examiner Debra F. Charles	Art Unit 3628	Page 3 of 3

U.S. PATENT DOCUMENTS

*		Document Number Country Code-Number-Kind Code	Date MM-YYYY	Name	Classification
	A	US-			
	B	US-			
	C	US-			
	D	US-			
	E	US-			
	F	US-			
	G	US-			
	H	US-			
	I	US-			
	J	US-			
	K	US-			
	L	US-			
	M	US-			

FOREIGN PATENT DOCUMENTS

*		Document Number Country Code-Number-Kind Code	Date MM-YYYY	Country	Name	Classification
	N					
	O					
	P					
	Q					
	R					
	S					
	T					

NON-PATENT DOCUMENTS

*		Include as applicable: Author, Title Date, Publisher, Edition or Volume, Pertinent Pages)
	U	Bessemer Trust Company web page: www.bessemer.com
	V	Jennifer Weitzman, Citi Private Bank to Customize Service on Web, American Banker, March 2, 2000.
	W	
	X	

*A copy of this reference is not being furnished with this Office action. (See MPEP § 707.05(a).)
Dates in MM-YYYY format are publication dates. Classifications may be US or foreign.